INSIDEA

★ 4.99 across 450+ verified reviews · 1,500+ businesses · Elite HubSpot Partner

CUSTOMER STORY · SAAS

B2B SaaS Demo Pipeline

500%
Increase in Demo Bookings

A fast-growing cybersecurity SaaS company was struggling with disorganized CRM data, an unstructured sales onboarding process, and inconsistent lead generation that kept demo bookings well below potential. INSIDEA restructured the company's HubSpot CRM, introduced a standardized sales onboarding...

PARTNER TIER

Elite Solutions Partner
HubSpot's highest partner tier

ACCREDITATIONS

Five HubSpot Solutions Partner accreditations

HubSpot Onboarding · Platform Enablement · CRM Data Migration · Custom Integration · CRM Implementation

THE CHALLENGE

As the company expanded, the gaps in its operational foundation became impossible to ignore. Its CRM contained duplicate records, inconsistent data, and manual workflows that slowed down every step of the sales process. Onboarding new sales hires was time-consuming and ad hoc, which drained resources and delayed ramp-up time. Meanwhile, lead generation suffered directly from these inefficiencies – demo bookings were...

WHAT INSIDEA BUILT

CRM Management, Business Development, Sales Operations

✓ **CRM Optimization and Automation**
The CRM was fully restructured to eliminate data duplication and fix inconsistent workflows. Leads were automatically tracked, updated, and assigned to the right sales...

✓ **Sales Onboarding Framework**
A structured onboarding program was introduced for new sales team members, covering CRM usage, internal workflows, and performance expectations. This standardized...

✓ **Sales Operations Alignment**
Day-to-day sales operations were streamlined through defined processes for lead handling, pipeline movement, and task management. By reducing administrative burden, the...

✓ **Business Development and Lead Generation**
Targeted lead generation strategies were layered on top of the improved CRM and operational foundation. With cleaner data, better workflows, and aligned processes in...

MEASURABLE RESULTS

500%	25–30/mo	100%	5x
Increase in Demo Bookings	Demo Meetings Achieved	CRM Automation Achieved	Sales Onboarding Efficiency

> *""We have been working with the INSIDEA team for about two and a half years now, and they have truly become an extension of our team. They have been incredible partners, always ready to jump in and help us tackle any issue, whether it is a website challenge or optimizing our CRM workflows. INSIDEA has supported us in lead generation, expanding our digital marketing reach, managing campaigns, and improving our marketing automation. Overall, our experience with INSIDEA has been outstanding, and I highly recommend their services to anyone looking to elevate their marketing and sales efforts.""*
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Want results like these in your business?
A 30-minute strategy call to map your systems and goals. Fixed-fee proposal if we are a fit.

Book a Strategy Call →